

A sepia-toned photograph of an elderly couple. The woman, on the left, has blonde hair and is wearing a light-colored, ruffled blouse. The man, on the right, has grey hair and is wearing a dark polo shirt. They are both smiling and looking towards a laptop screen, which is partially visible in the lower right corner. The background shows horizontal window blinds.

TAX HELP for **SENIORS**

CALIFORNIA
STATE BOARD OF EQUALIZATION



CALIFORNIA STATE BOARD OF EQUALIZATION

GEORGE RUNNER

VICE CHAIR, 1ST DISTRICT

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You deserve to enjoy the rewards of your life's work, but rising taxes and inflation can leave you feeling squeezed.

As a California senior, you should know about the tax benefits and services available to you. For example, you may qualify for property tax exemptions or be eligible for free income tax preparation.

The information in this brochure and online will help you access valuable tax help. If you need additional assistance, please call the phone number listed below.

500 Capitol Mall, Suite 1750
Sacramento, CA 95814-4470

Telephone: **916-445-2181**

Fax: **916-327-4003**



TAX TIPS FOR CALIFORNIA SENIORS

- **Moving?** If you are 55 or older and selling your home, you may be able to transfer the taxable value of your current property to your new property, saving hundreds or thousands of dollars each year.
- **Got kids?** If you sell or transfer property to your child or grandchild, they may be able to maintain the taxable value of the property.
- **Overtaxed?** If you pay a parcel tax or special assessment, you may be eligible for an exemption. To find out, check your bill for the contact information of the local district or agency that imposed the parcel tax or special assessment.
- **Need tax help?** You may be eligible for free income tax help from certified volunteers who can answer your questions about pensions and other retirement issues unique to seniors.
- **Buying meds?** If you buy your prescription medications from a registered pharmacist, in person or online, your purchases are not subject to tax.
- **Hungry?** Meals sold to low-income seniors by a nonprofit organization or governmental agency may not be taxable.

Learn more at:

www.boe.ca.gov/seniors



Government should provide easily accessible information about tax programs and be available to answer questions. Please call or mail back the card below to request assistance or receive more information.

Please mail back this card to request assistance or receive more information.

I would like more information regarding

☐ Income Tax ☐ Property Tax ☐ Sales & Use Tax

First Name

Last Name

Address

City/State/Zip

Daytime Telephone

Email

Cut this card on the dotted line, attach postage, and mail. *Privacy Statement:* Your contact information will not be shared. It will only be used to periodically inform you of important policy issues.



Return Address:

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Required
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without proper
postage.

GEORGE RUNNER
Vice Chair, 1st District
California State Board of Equalization
500 Capitol Mall, Suite 1750
Sacramento, CA 95814-4740





Do you know what tax
benefits are available to
California seniors?

Learn more at:
www.boe.ca.gov/seniors
